David Warshaw, CFP®
FOUNDER & PRIVATE WEALTH ADVISOR
The WealthPlan LLC

The WealthPlan Onboarding Guide

Everything you need to know as my new client

Meet Amy Fike, Client Service Associate

Meet Amy Fike — she's the other half of your WealthPlan experience. Amy works closely with me every day to keep things running smoothly behind the scenes, and she's my go-to resource for Schwab questions, paperwork, and anything operational. She also serves as your backup contact if you ever need to reach someone and can't get me directly. Between the two of us, you're always covered.

Schedule time with Amy amy@yourfinancialva.com

Communication

The foundation of a successful long-term financial relationship is open, honest communication. Please never hesitate to reach out — no question is too small. All calls, texts, and emails are returned within 24 hours — and typically much sooner.

Call or Text Me Directly

(516) 400-7111

My days are filled with meetings, so texting is usually the fastest way to reach me. I call in between meetings or after the day wraps up. Worst case, you'll hear back the next business day.

CurrentClient

I use a tool called CurrentClient to send important updates and reminders to all clients. Messages come from **(516) 613-5552** — save that number in your contacts so you know it's from me. It's a one-way broadcast line, so please don't reply to it. For anything direct, always reach me at (516) 400-7111.

What Does This Cost?

Our pricing is straightforward — no hidden charges, no surprises. For a full breakdown, visit the **Pricing page** on our website. Questions? Just ask.

Scheduling Our Meetings

At the end of every meeting, let's aim to book our next one to keep your plan moving forward. Be sure to bookmark my Calendly link:

Book a meeting here!
https://calendly.com/thewealthplan

Meeting Summary Emails

After every meeting, you'll receive a summary email recapping what we discussed, any action items, and next steps. This way you can focus on the meeting and not note-taking.

Secure Document Delivery

ENCYRO

When I need to send documents containing personal information, I use **Encyro** — a secure email encryption platform that keeps your sensitive data protected in transit.

How to open an Encyro message:

The email will appear from one of the following senders:

- **David Warshaw (The WealthPlan LLC) via Encyro** — sent by me
- **Amy Fike via Encyro** — sent by Amy

1. Click the button labeled **"Access & Let Expire"** to download the file
2. No login or account required
3. Save the file directly to your device

For security purposes, access expires after 5 business days.

Your Schwab Account

Your accounts are held at **Charles Schwab**. All paperwork is handled digitally through DocuSign — you'll receive an email to review and sign, and Schwab will verify your identity with two-factor authentication and three security questions. Be sure to review the **Schwab Guide** on my site before we get started.

What to expect in your inbox:

DocuSign emails will arrive as **Amy Fike via DocuSign**

From: dse_na2@docusign.net

Reply-To: amy@yourfinancialva.com

Outside Accounts

If you have accounts held at other institutions, I like to stay involved. From time to time, we may conference call with the outside firm together to review those accounts — especially if you plan to keep assets there. The goal is to make sure your full financial picture stays coordinated, not just the accounts we manage directly.

How Long Does Everything Take?

We know you're eager to get started — and we move quickly. Here's a general timeline of what to expect:

Milestone	Typical Timeframe	Notes
New account setup at Schwab	2–3 business days	Once DocuSign paperwork is complete
Transfers from outside accounts	7–10 business days	Timing depends on the outgoing institution — we'll give you a more precise estimate after speaking with them

Our Website

Our website, www.thewealthplan.com, has a dedicated Clients section where all your resources live.

Educational Content & Social Media

I create content specifically for clients like you — covering financial planning, investing, and everything in between. My YouTube channel is always there to fill in the gaps between our meetings, and there's a lot of great material to explore at your own pace.

▶ YouTube | f Facebook | 📷 Instagram | ♫ TikTok | 𝕏 X (Twitter) | in LinkedIn

You’ve made a great decision — and we’re genuinely excited to get to work.

Building a financial plan is one of the most meaningful things you can do for yourself and the people you care about. We don’t take that lightly. Between now and our first planning meeting, don’t hesitate to call or text me directly. That’s exactly what I’m here for.

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